The Business Case for Integration
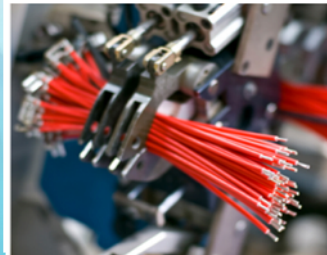
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2pm Eastern

Today's Panel

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About us

- Established: 1992
- Employees: 115+
- Locations: USA (5), Ireland, UK
- Customers: 1200+ Companies
  - 650+ full implementations
  - 350+ life science customers
  - 100+ reached exit strategy
- Products
  - QAD Adaptive ERP
  - Quality Systems
  - ERP Integrations & Extensions
  - FDA Validation Toolkit/Protocols
- Services
  - Implementations
  - Integrations
  - FDA Validation
  - Upgrades
  - Managed Services
  - QAD and EDI
  - QAD Help Desk (helpSERV)
  - Staff Augmentation

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The Challenge – Siloed Systems

Sales - Do These Sound Familiar?

Field Reps calling/emailing back to HQ to inquire about inventory levels, pricing, shipment status, etc.

Customer Service reps manually entering Sales Orders in QAD from CRM opportunities or order forms

Shipping - Do These Sound Familiar?

Shipping manually entering ship-to information in logistics provider's website

Shipping manually entering tracking number and freight charges in QAD

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Manufacturing & Quality - Do These Sound Familiar?

Document Control or Materials manually entering Item Masters in QAD when drawings/documents are released in quality system

QC Inspectors manually entering Nonconformance Reports on receiving or in-process inspection fails

Manually updating material location on quarantine or release, based on email or paper traveler

Manually updating supplier, customer and item lists in the quality system

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Finance - Do These Sound Familiar?

Downloading payroll file from ADP and manually posting JE

Manually entering Supplier Invoices from expense reports in Concur

Manually extracting data from QAD to use in BI software

What These Scenarios Have In Common…

- Manual data entry consuming your staff's time

- Process dependent on staff communication/process handoff

- Additional opportunities for error and extra process steps to minimize error

…all with a cost:

- Direct Labor cost

- Opportunity cost

- Scrap/rework cost

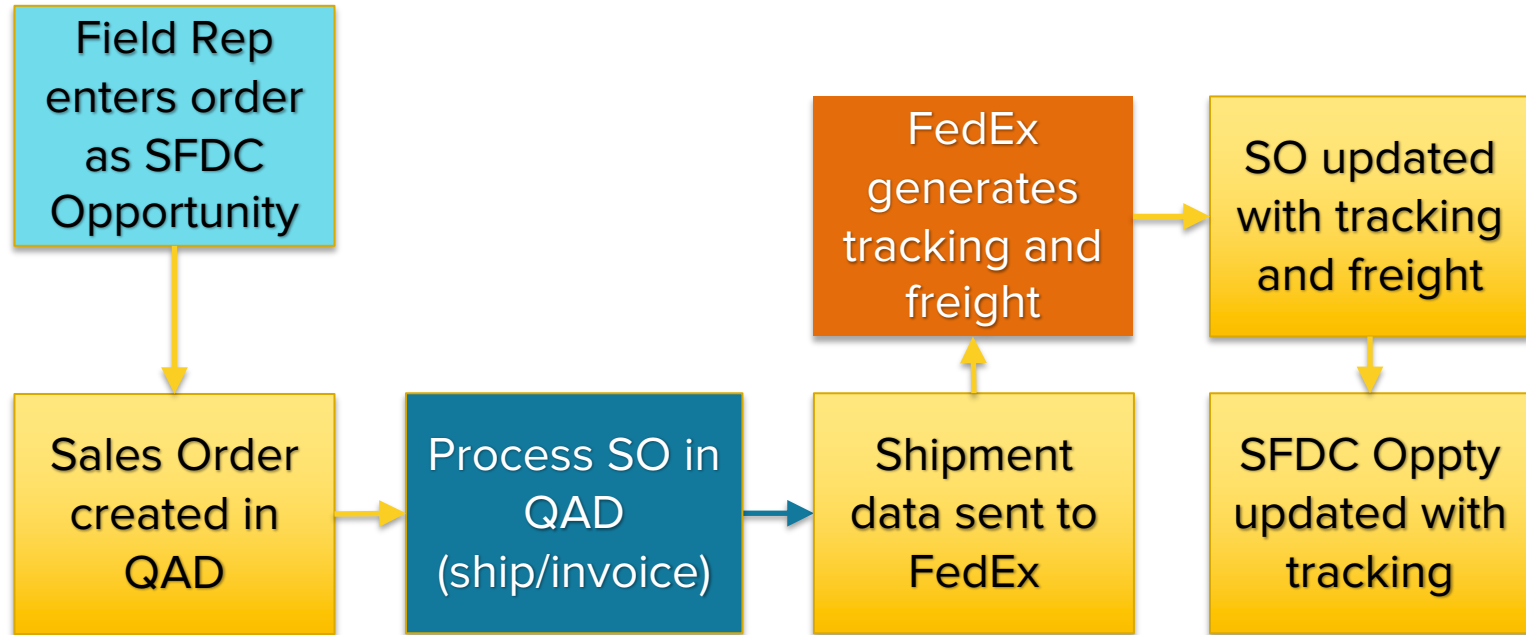- Customer Satisfaction cost

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The Solution – Automation through Integration

Modern IT Is All About Integration

- Systems communicating with one another – through orchestrated integration – yields the following benefits:
    - Reduction/elimination of manual data entry between systems
    - Increased data accuracy
    - A true system-of-record for common data
    - Fewer manual process handoffs
    - Increased staff bandwidth for higher-value activities, including further process optimization
    - Increased employee morale

Some Examples...

Real-World Examples – Order Processing

Field Rep enters order as SFDC Opportunity → **Sales Order created in QAD** → **Process SO in QAD (ship/invoice)** → **Shipment data sent to FedEx** → **FedEx generates tracking and freight** → **SO updated with tracking and freight** → **SFDC Oppty updated with tracking**

* SKUs/Items, Pricing, Inventory levels updated via integration from QAD to SFDC

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Real-World Examples – Order Processing

- Benefits:
  - Field Reps can operate completely from SFDC
    - Necessary info is available and current in SFDC
    - Order is placed from SFDC
  - No manual data entry in QAD
  - Streamlined process allows for faster order fulfillment
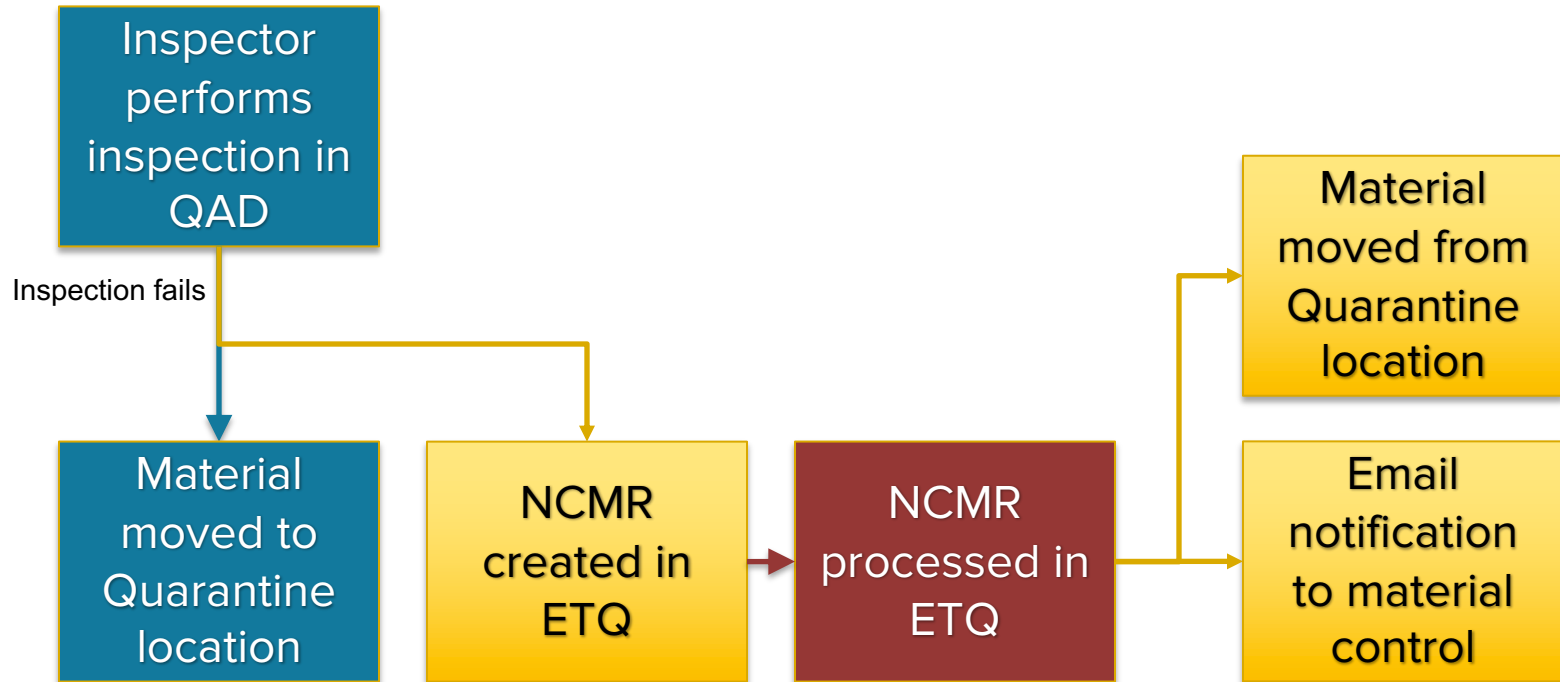
Real-World Examples – Expense Reporting

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┌──────────────┐        ┌──────────────┐              ┌──────────────────┐
│   Data is    │        │   Adapter    │              │  Adapter calls   │
│  downloaded  │───────▶│  reads and   │  - AND -     │ program to create│
│ from Concur  │        │  validates   │     - OR -   │   Credit Card    │
│              │        │     data     │              │ Supplier Invoice │
└──────────────┘        └──────────────┘              └──────────────────┘
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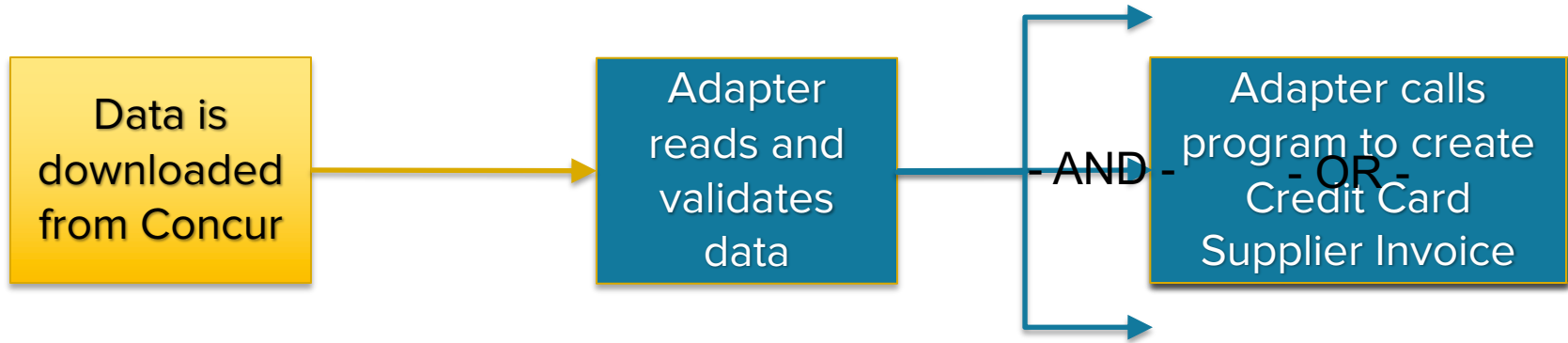
Can be scheduled batch task or user initiated   Email notification on failed data load
Can use Concur FTP, API or manual download   Program to find data correction in QAD available

Real-World Examples – Expense Reporting

- Benefits:
    - No manual data entry in QAD
    - Streamlined process allows for faster employee reimbursement

Real-World Examples – Nonconformance Handling

Inspector performs inspection in QAD

Inspection fails

Material moved to Quarantine location

NCMR created in ETQ

NCMR processed in ETQ

Material moved from Quarantine location

Email notification to material control

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Real-World Examples – Nonconformance Handling

- Benefits:
  - No manual data entry to initiate NCMR in ETQ
  - Automated inventory movement reduces risk of material being allocated to production order or sales order
  - Automated NCMR creation reduces process delays and eliminates risk of data entry errors

Strategic Can Help!

Benefits of Integration

- Reduction/elimination of manual data entry between systems

- Increased data accuracy

- A true system-of-record for common data

- Fewer manual process handoffs

- Increased staff bandwidth for higher-value activities, including further process optimization

- Increased employee morale

Strategic Integration Solutions

- Robust and Growing Offering of Prebuilt Integration Products for day-to-day transactions, including:
  - CRM (e.g. Salesforce)
  - Logistics (FedEx/UPS/USPS)
  - PLM (Arena, Agile)
  - QMS (QAD QMS, ETQ Reliance, etc.)
  - FX Rate services (OANDA, etc.)
  - HR/Payroll/Labor Reporting (ADP, Workday, etc.)
  - Expense/Spend (e.g. Concur, Coupa, etc.)
  - Sales Tax (Avalara, Cytak)
  - Banking Integration

Strategic Integration Solutions

- Robust and Growing Offering of Prebuilt Integration Products for analytics, BI, and financial performance management including:
  - Phocas
  - Prophix
  - Tableau
  - Workday (Adaptive Insights)
  - Power BI

Strategic Integration Solutions

- Our Integration products shorten time-to-value by leveraging pre-built configurations for the most common scenarios, while still allowing flexibility to align with your unique business processes

- Priced to be cost-effective to achieve ROI faster

- Integration team has decades of experience connecting a wide variety of systems with QAD

Questions?

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To Learn More

- Ask your Strategic Account Executive
- Email sales@strategic.com
- Review www.strategic.com/

Thank you for attending!

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